

**Goal -**

Provider Sioux City - Center for Siouxland Bridges West (527)  
 Case Manager  
 Date Goal was Set 10/15/2014  
 Classification Financial Stability  
 Type Obtain money management skills/credit counseling  
 Goal Description  
 Target Date  
 Overall Status In Progress  
 If Closed, Outcome  
 If Partially Complete,  
 Percent Complete

Projected Follow Up Date

Follow Up User

Follow Up Made

Completed Follow Up Date

Outcome at Follow Up

**Case Notes**

Provider	Case Manager	User Creating Note	Date	Note
Sioux City - Center for Siouxland Bridges West		Mary Smith	03/23/2015	She was having issues with the DHS and securing the FIP and Foodstamps increase for the time that she is under medical care. She has to verify things and so far doesn't know anything. Recommended that she calls back and talk to someone.
Sioux City - Center for Siouxland Bridges West		Mary Smith	03/23/2015	boys are getting registered for BTB. Her account was cleared out and they are ready to go to BTB once the registration forms are turned in. There is a waiting list for 4th and 5th graders but kindergarten there isn't. Also there is a \$5 deposit for the DHS kids.
Sioux City - Center for Siouxland Bridges West		Mary Smith	03/16/2015	FIP is going to pay for March fees.
Sioux City - Center for Siouxland		Mary Smith	02/02/2015	met with credit counselor and things went well. They are recalculating the student loan. With all of her current bills (without

Bridges West				the student loans) she should have \$220 extra each month. She cut back on eating out and fast food. She is going to try to stick to.
Sioux City - Center for Siouxland Bridges West		Mary Smith	12/30/2014	paid off her December fees and then she will pay the remainder of Jan's fees on the 5th of Jan because she needed to break it up into two checks.
Sioux City - Center for Siouxland Bridges West		Mary Smith	12/08/2014	She is looking forward to meeting with credit counselor again to discuss budgets.
Sioux City - Center for Siouxland Bridges West		Mary Smith	12/08/2014	She still owes \$117 on her divorce. She has been saving for that because she wouldn't be able to have her registration because there is that lien on it.
Sioux City - Center for Siouxland Bridges West		Mary Smith	10/22/2014	credit counselor gave her a goal/plan sheet for budgeting. She is going to run the credit report for client. She believes that it will be something good for her.
Sioux City - Center for Siouxland Bridges West		Mary Smith	10/15/2014	FIP was approved but have not received yet. Will be getting \$426 for Oct and Nov and \$158 for Dec. They also are adjusting her food stamps. She gets \$146 with full time employment.
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### Action Steps Planned

Action Step	Target Date	Status	Outcome
No matches.			

### Service Items for this Goal

Date Set	Created By	Need Type	Need Status	Outcome of Need
No matches.				

Date \_\_\_\_\_ Client Signature \_\_\_\_\_

Date \_\_\_\_\_ Case Manager Signature \_\_\_\_\_